

**The California Debt and Investment Advisory Commission**  
**presents**  
**TOOLS TO REVITALIZE CALIFORNIA COMMUNITIES**  
September 25, 2002  
Oakland, CA  
8:30 am – 4:30 pm

**Welcome and Introduction**

8:30 – 8:45 am

*Lisa M. Harris, Executive Director of the California Debt and Investment Advisory Commission (CDIAC)*

**Morning Sessions: Economic Development Programs Available to Local Communities**

***I. Concurrent Sessions: 8:45 – 9:45 am***

**Session One: Business and Job Creation – Bond Financing Programs**

- Industrial Development Bonds
- California Infrastructure Economic Development Bank
- Joint Power Authority Bonds

***Moderator:*** *Joanie Jones-Kelly, California Industrial Development Financing Advisory Commission (CIDFAC)*

*Jeff Emanuels, California Infrastructure and Economic Development Bank (CIEDB)*

*James Hamill, California Statewide Communities Development Authority (CSCDA)*

*Bruce Kern, Economic Development Alliance for Business (EDAB)*

**Session Two: Creating Affordable Health Care**

- CHFFA: State Help II Program
- Health Care Technical Assistance Program
- Health Care Insurance Programs

***Moderator:*** *Sumi Sousa, California Health Facilities Financing Authority (CHFFA)*

*Scott Spote, NCB Development Corporation*

*Mike Sullivan, Golden Valley Health Centers*

*Steve Beckman, CAL Mortgage*

*Mike Mamot, Central Coast Neurobehavior Center in Morro Bay*

**Session Three: California Affordable Housing Programs**

- Extra Credit Teacher Home Purchase Program
- Housing and Community Development
- Affordable Housing Financing

***Moderator:*** *Laurie Weir, California Debt Limit Allocation Committee (CDLAC)*

*Jeanne Peterson, California Tax Credit Allocation Committee (CTCAC)*

*Julie Bornstein, Department of Housing and Community Development*

*Julia Bidwell, Orange County, Housing and Community Development*

*Theresa Parker, California Housing Finance Agency (CHFA)*

**Break**  
**9:45 – 10:00 am**

**II. Concurrent Sessions: 10:00 – 11:00 am**

**Session One: Business and Job Creation – Loan Programs**

- Local Community Development Banks
- Local Bank Loan Programs
- California Capital Access Program
- California Infrastructure Revolving Fund

**Moderator:** Karen Newquist, California Pollution Control Financing Authority (CPCFA)  
Phillip Palmer, Community Bank of the Bay  
Herb Aarons, California Coastal Rural Development Corporation  
Stanton Hazelroth, CIEDB  
James Wright, Wells Fargo Bank

**Session Two: Technical Assistance Programs for Brownfield Sites**

- State Cal RE-Use Program
- Non-Profit Grant Program
- City of Oakland Brownfield Program

**Moderator:** Steve Sakurai, CPCFA  
Stephanie Shakofsky, Center for Land Recycling (CCLR)  
Bill Lambert, City of Oakland  
Evan Henry, Bank of America

**Break**  
**11:00 – 11:10 am**

**III. Concurrent Sessions: 11:10 am – 12:10 pm**

**Session One: Private Equity Investment Programs: Targeting Underserved Markets**

- CalPERS California Initiative Program
- Investment Groups Targeting Minority Owned and Managed Businesses

**Moderator:** Joncarlo Mark, California Public Employees' Retirement System (CalPERS)  
Ed Renwick and Carlton Jenkins, Yucaipa Companies  
Luis Nogales, Nogales Partners  
Lewis Byrd, Opportunity Capital Partners  
Sanjiv K. Shah, Bank of America  
Peter Nolan, Green Equity Investors  
Thomas Darden, Reliant Equity Investors

**Session Two: Urban Real Estate Development and Financing Programs**

- CalPERS California Urban Real Estate Initiatives Program
- Industrial and Housing Development Groups: Targeting National Urban Markets

**Moderator:** Julie Stewart, CalPERS  
Avi Shemesh, CIM Group LLC  
Carol Galante, Bridge Housing Corporation  
Robert Brunswick, Buchanan Street Partners  
Victor MacFarlane, MacFarlane Partners, Inc.

### **Luncheon**

12:15 – 1:30 pm

#### **Tools in Action: City of Oakland's Experience**

*The City Manager of Oakland shares one city's experience about using financing tools to revitalize an urban community.*

Introduction: Barbara Lloyd, Deputy Treasurer, California State Treasurer's Office

Speaker: Robert C. Bobb, City Manager of Oakland

## **MEET THE PROS**

### **Afternoon Sessions: Bridging the Gap-Roundtable Discussions**

#### **IV. Concurrent Roundtables TRACK A – 1:30 – 2:50 pm**

##### **1. Start-Up and Growth Capital: What Opportunities Are Most Attractive to Venture Capitalists**

**Moderator:** Peter Thompson, Opportunity Capital Partners

Lewis Byrd, Opportunity Capital Partners

Thomas Darden, Reliant Equity Investors

##### **2. Corporate Partnering: Putting Medium and Large Companies Together with Private Equity Investment Firms**

**Moderator:** Elizabeth Ferguson, Bay Area Council

Carlton Jenkins, Yucaipa Companies

Luis Nogales, Nogales Partners

Lee Winslett, Wells Fargo Bank

Peter Nolan, Green Equity Investors

##### **3. Community Development Loans for Small Businesses**

**Moderator:** Arnold Bellow, Northern CA Financial Development Corp

George McDaniels/Phillip Palmer, Community Bank of the Bay

George Williamson, California Economic Development Lending Initiative (CEDLI)

Ed Tong, Asian Inc.

Delores A. McKinnon, Department of Insurance California Organized Investment Network (COIN)

##### **4. Housing and Urban Real Estate**

**Moderator:** Jim Buckley, Citizen Housing

Laurie Weir, CDLAC

Julie Stewart, CalPERS

Lynette Lee, East Bay Asian Local Development Corporation

Theresa Parker, California Housing Finance Agency

Raul Amezcua, Salomon Smith Barney

K. Robert Turner, Canyon Capital Realty Advisors

Isiah Turner, City of Richmond

Kristin Faust, Nehemiah Community Reinvestment Fund

Arabella Martinez, The Unity Council

**Break**

2:50 – 3:00pm

**MEET THE PROS**

**Afternoon Sessions: Bridging the Gap: Roundtable Discussions**

**V. Concurrent Roundtables TRACK B – 3:00 – 4:20 pm**

**1. Business and Job Creation**

**Moderator:** Wayne Schell, California Association for Local Economic Development (CALED)

Joanie Jones-Kelly, CIDFAC

Carey Jenkins, L.A. Community Development

Leonard Berry, The Chapman Company

Dinorah Hall, Main Street Program, CA Technology, Trade & Commerce Agency

**2. Creating Affordable Health Care**

**Moderator:** Sumi Sousa, CHFFA

Scott Spote, NCB Development Corporation

Mike Sullivan, Golden Valley Health Centers

Mike Mamot, Central Coast Neurobehavior Center in Morro Bay

**3. Brownfield Development**

**Moderator:** Keith Carson, County of Alameda Board of Supervisors

Stephanie Shakofsky, CCLR

Steve Sakurai, CPCFA

Bill Lambert, City of Oakland

**4. Federal Sources of Capital for Business Development**

**Moderator:** Bernice Martinez, US Department of Commerce

Austin Belton, Small Business Administration, Investment Division

Mark Quinn, Small Business Administration, San Francisco Region

Tony Brown, US Department of Treasury

Leonard Smith, Economic Development Administration

Steven Sachs, Housing and Urban Development, Community Planning Development

Lee Mercer, National Association of Small Business Investment Companies (NASBIC)

**Reception**

4:30 pm

Reception for all.

Keynote Presentation: Betsy Zeidman, Milken Institute